



BCVB 2012 YOUTH SPORTS STUDY

Prepared by H²R Market Research | December 2012

METHODOLOGY

WHO

Adult Attendees of 2012 Branson Youth Sports Activities

WHEN

March-November 2012

WHAT

Evaluation of Branson's Youth Sports participation as well as satisfaction with Branson as a host city

HOW

Sample of 273 adult attendees for an overall margin of error of +/-5.9% on a 95% confidence interval

Youth Sports Visitors are Loyal

- Nearly 90% of Branson's 2012 Youth Sports visitors were families with children, and more than half (53%) came from beyond 100 miles.
- More than three-quarters (77%) spent the night in Branson during their visit, and the average sports visitor spent 3.4 nights in Branson.
- Compared to Branson's average family visitor, sports travelers visit the area more frequently and spend roughly about the same amount of money per person in the area each day.



More than Just Sports

- Branson's youth sports visitors do far more than attend sporting events while in Branson.
- More than two-thirds shopped during their stay and more than half (53%) visited the Branson Landing. Four in ten said they visited Silver Dollar City during their stay and 36% participated in other outdoor activities. More than one-third of these family visitors visited area music shows, and 21% participated in activities on the lake. Similarly, nearly one in seven visited area museums, and 15% said they took a sightseeing excursion during their visit.



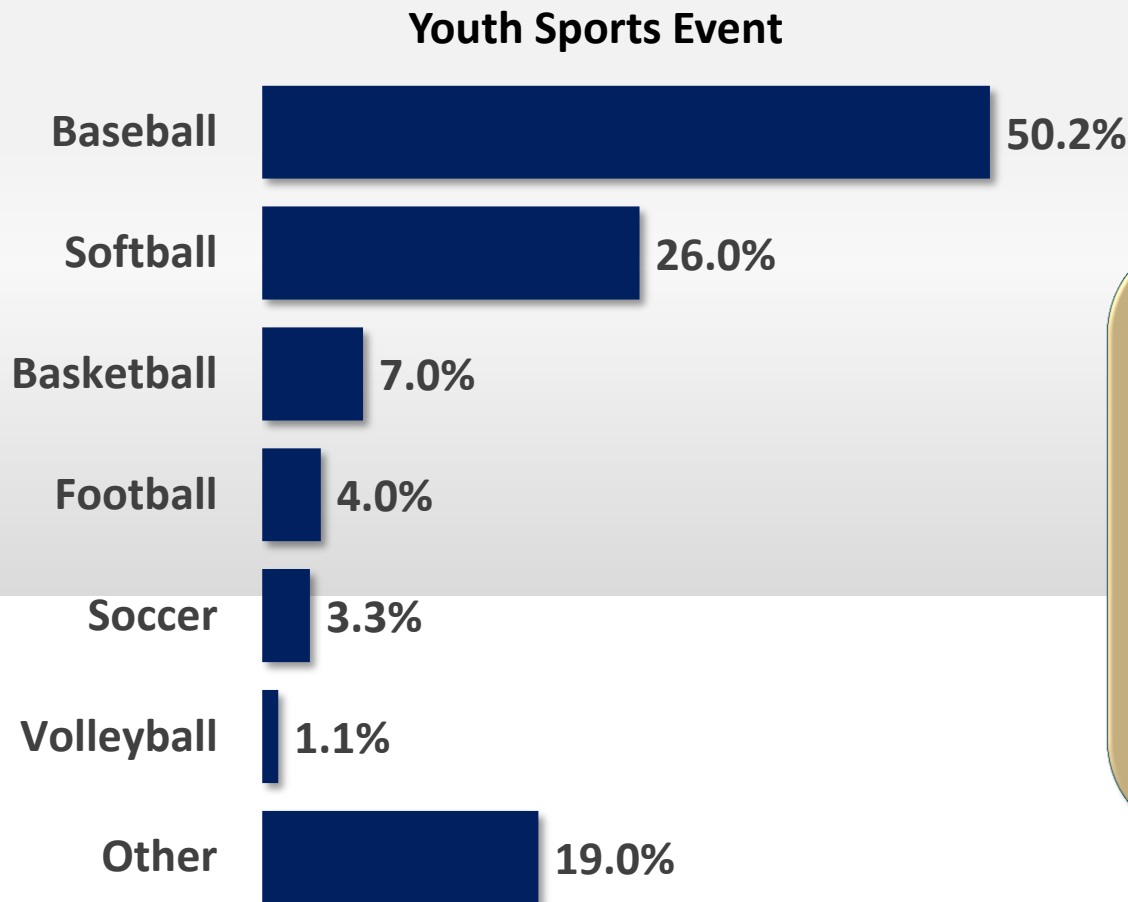
Brand Evangelists

- Sports travelers love Branson! Nearly all respondents said they travel to other cities to watch their kids play sports, and the vast majority indicated that Branson's friendliness, facilities, event organization, activities outside the event and value for the dollar are all much better than other cities they have visited.
- This year's attendees are also strong brand advocates of Branson giving the area an impressive 70% Net Promoter Score (intent to recommend). This is much higher than this year's overall families score (44%) and much stronger than the average leisure destination score which averages just under 40%.
- Nearly all (96%) rated their visit to Branson as good or excellent.



YOUTH SPORTS IN BRANSON

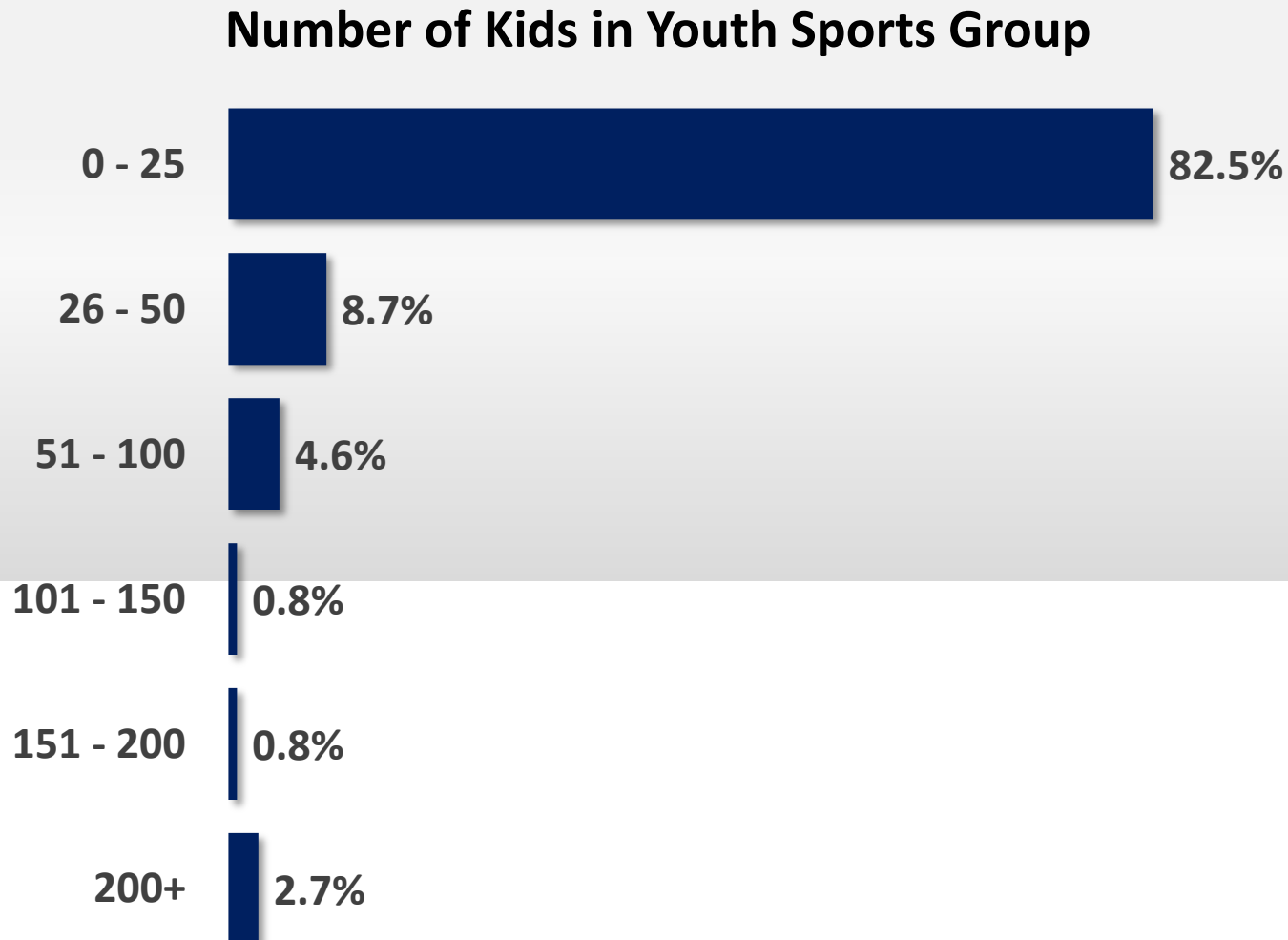
The majority of youth sports travelers visited Branson for youth baseball events, followed by softball and basketball.



Other Events:

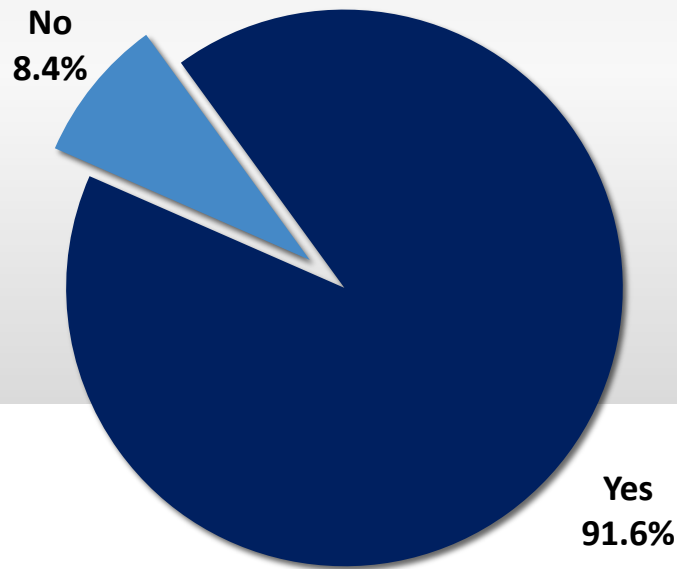
Cheerleading Competitions
Dance Competitions
Ironman
Track
Swimming
Triathlon
Wakeboarding

Most sports groups had fewer than 25 kids. More than 8 in 10 youth sports groups had 0-25 kids in their group with a few groups having as many as 26-50 and 51-100.



Youth sports spectators traveled far and wide to see their kids play.

Travel to Other Cities for Youth Sports?



The Youth Sports market is a dedicated group of individuals that travel to many places for these types of events. It's key that Branson remains part of the competitive circuit to retain customers in this market.

Youth sports spectators considered Branson better or much better than other cities they have visited.

Branson compares very favorably to other cities across the Youth Sports market. Nearly 9 in 10 respondents agreed that Branson is better than other cities in friendliness of area people and activities available outside the event.

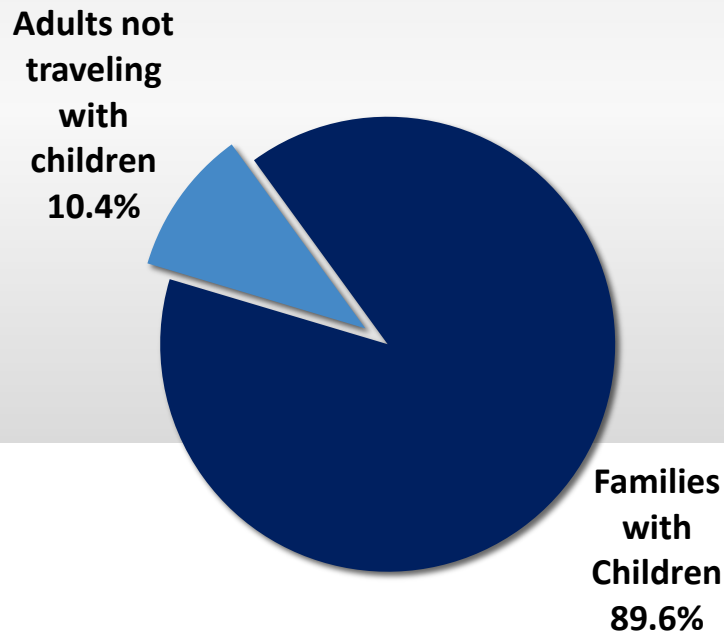
Branson Compared to Other Cities - % Better



TIME SPENT IN BRANSON

Unlike Branson travelers in general, the vast majority of this year's youth sports travelers were families with children.

Party Composition - Youth Sports

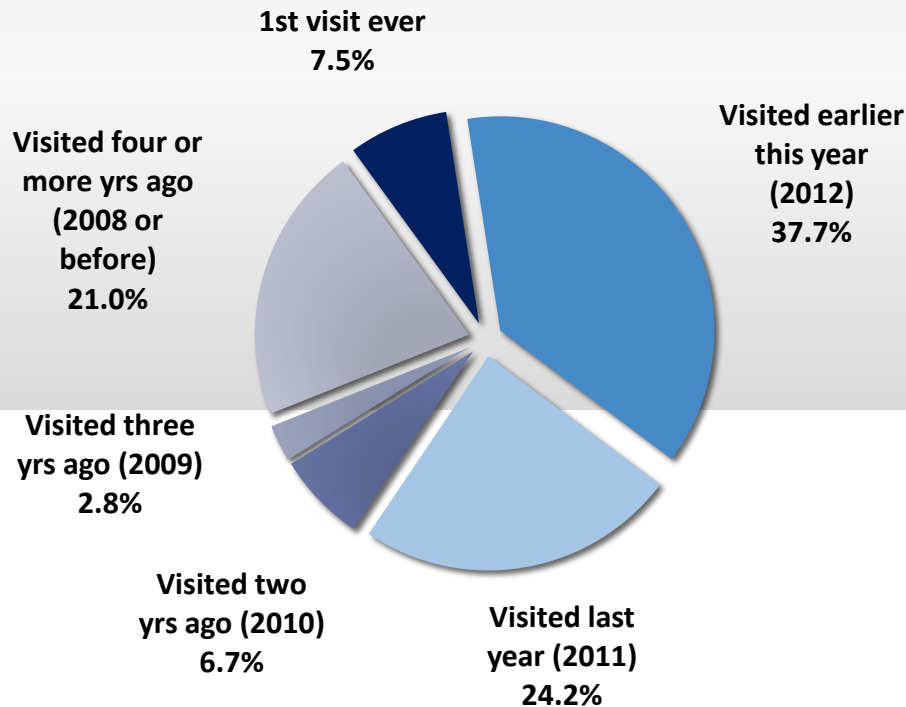


Party Composition - Branson Overall

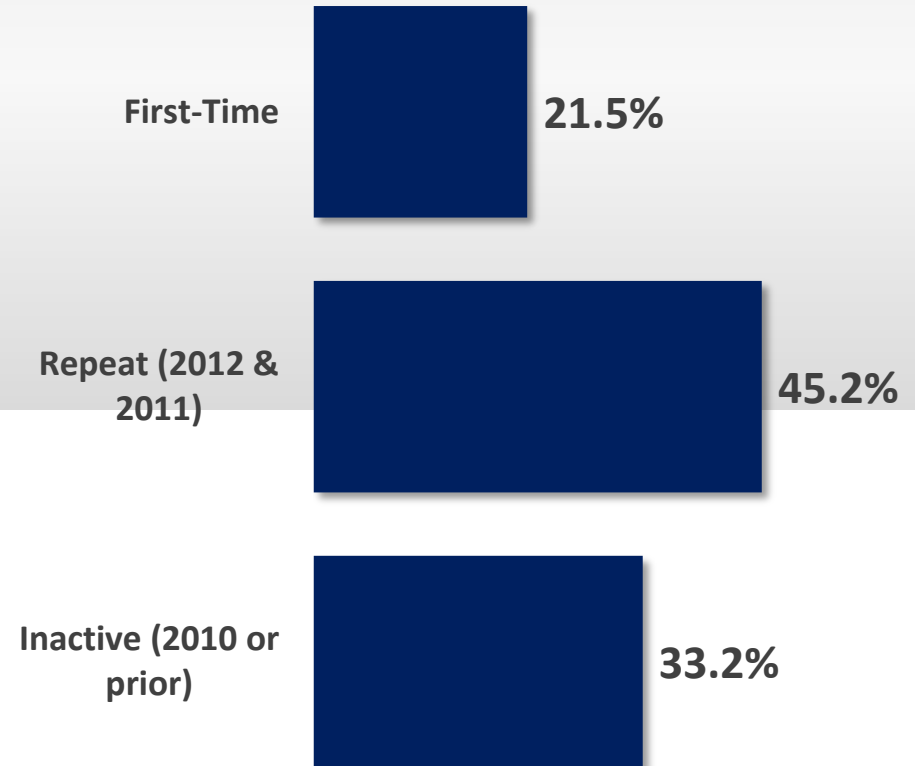


**Youth sports travelers tend to be higher repeat visitors for Branson.
More than 90% of youth sports visitors were repeat Branson travelers.**

Last Visit to Branson

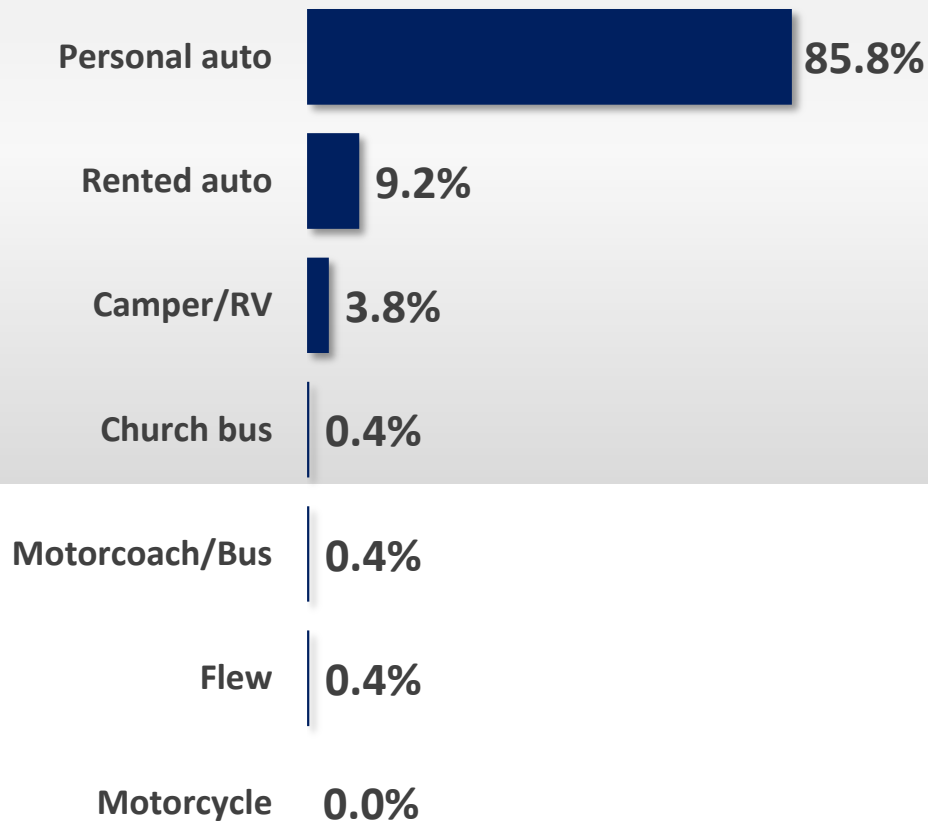


**Last Visit To Branson –
Branson Families Overall**

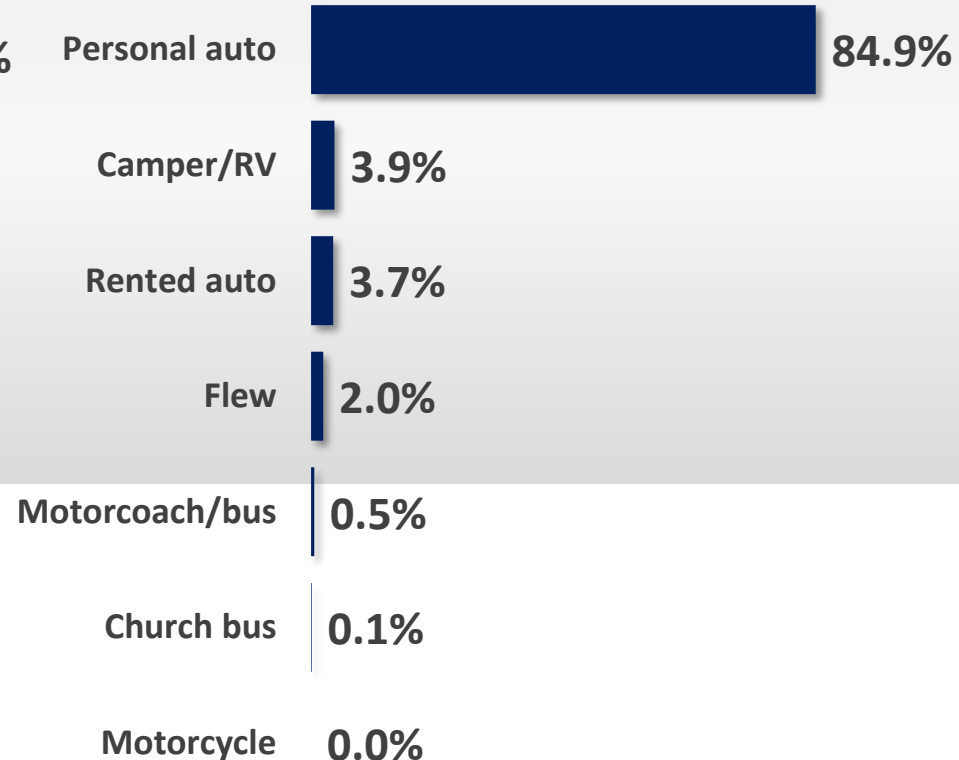


Youth sports visitors, much like Branson travelers in general, are “rubber tire travelers”—nearly 9 in 10 traveled by personal automobile.

How Traveled to Branson

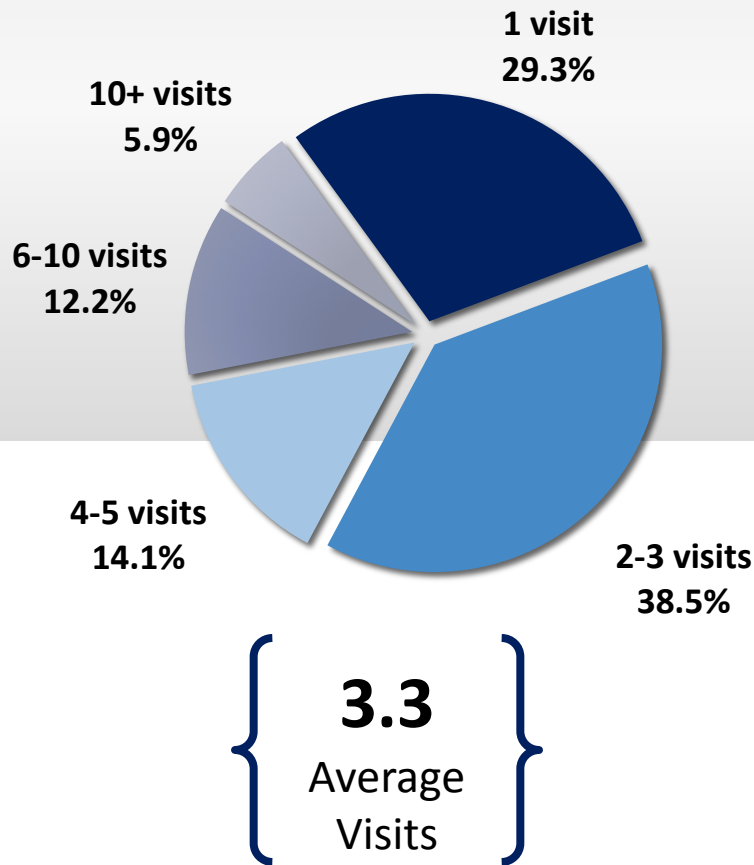


**How Traveled to Branson
Branson Families Overall**

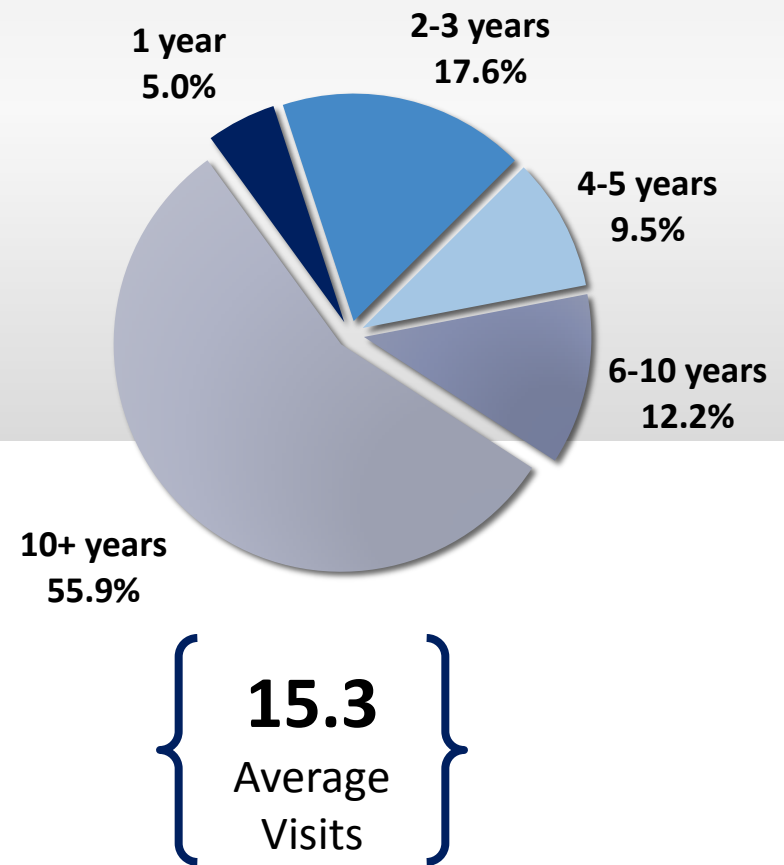


In the past 2 years, youth sports visitors have visited the area a little more than 3 times for youth sports related activities. Most visitors have been coming to the area for more than 10 years.

No. of Visits to Branson in Past 2 Years for Youth Sports

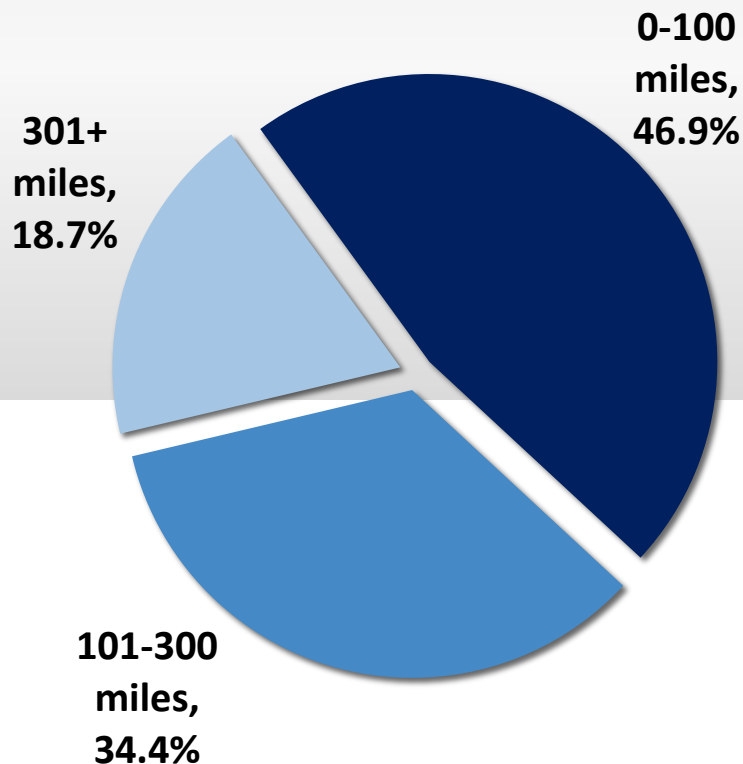


No. of Years Coming to Branson

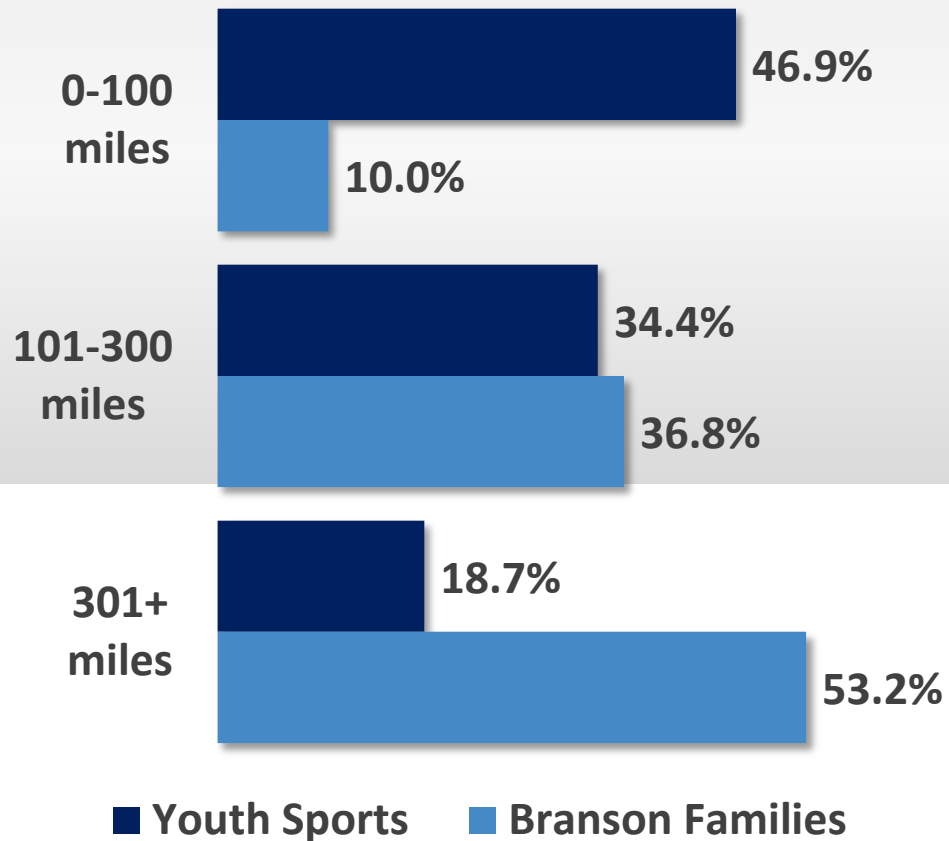


Youth sports travelers tend to be more regional than the average Branson family visitor; likewise, they are more recession resistant.

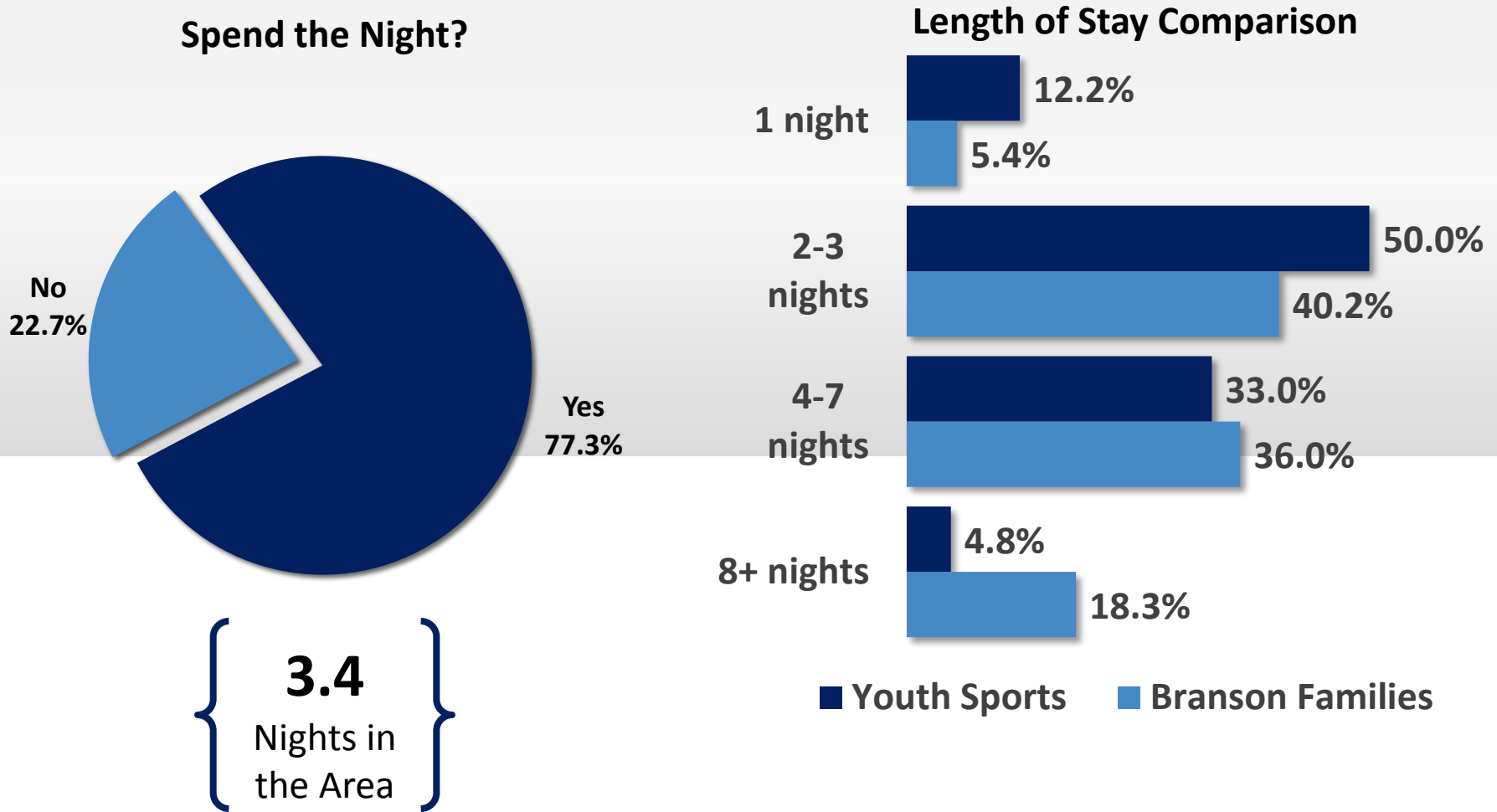
Youth Sports Distance Traveled



Distance Comparison



Despite being slightly more regional, most youth sports visitors spent the night in Branson and stayed an average of 3.4 nights.



The most popular activities youth sports visitors participated in this year included Shopping, Branson Landing and Silver Dollar City.



**BRANSON
LANDING**



**SILVER DOLLAR
CITY**



**OUTDOOR
ACTIVITIES**



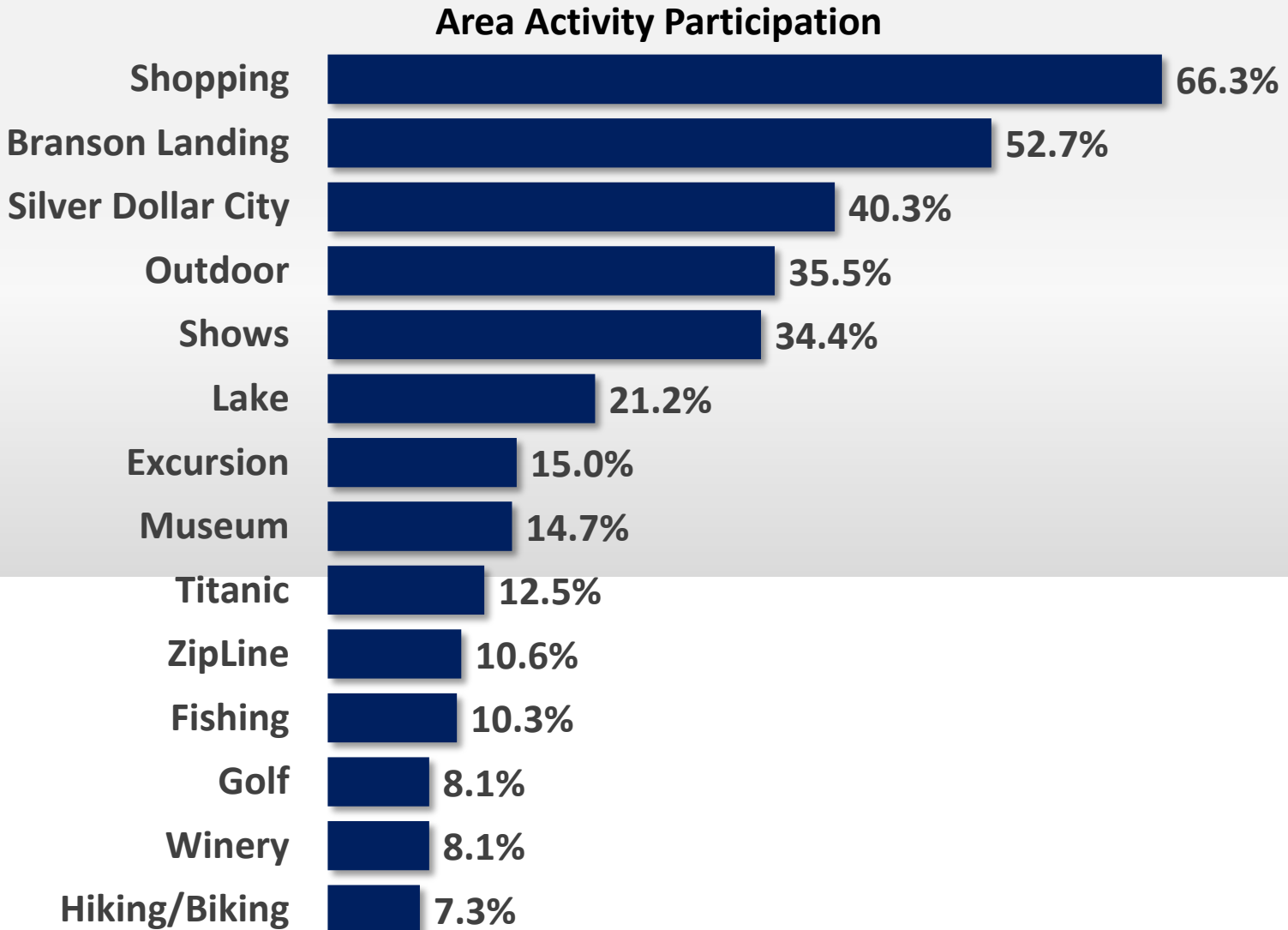
SHOPPING

SHOWS

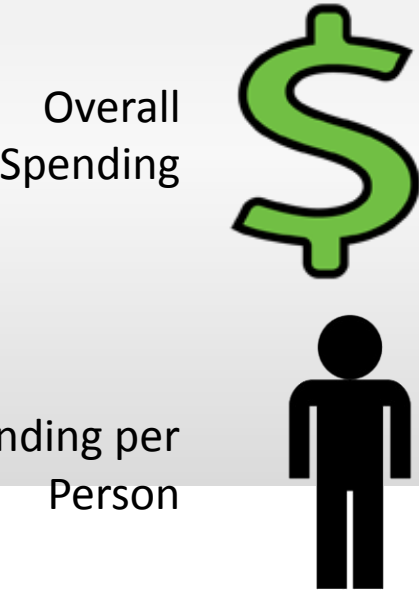


**&
more**

More than two-thirds of the youth sports visitors went shopping and over half went to the Branson Landing.



Branson youth sports travelers spent about the same amount of money *per person per day* as Branson family visitors.

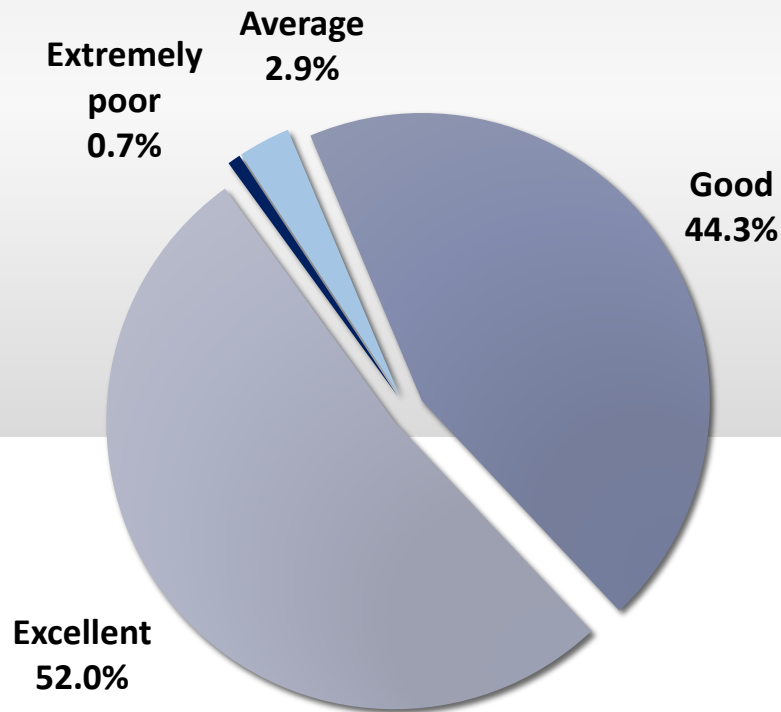


Youth Sports Visitor	Avg. Branson Family Visitor
\$767	\$1,189
\$153	\$225
\$44	\$56

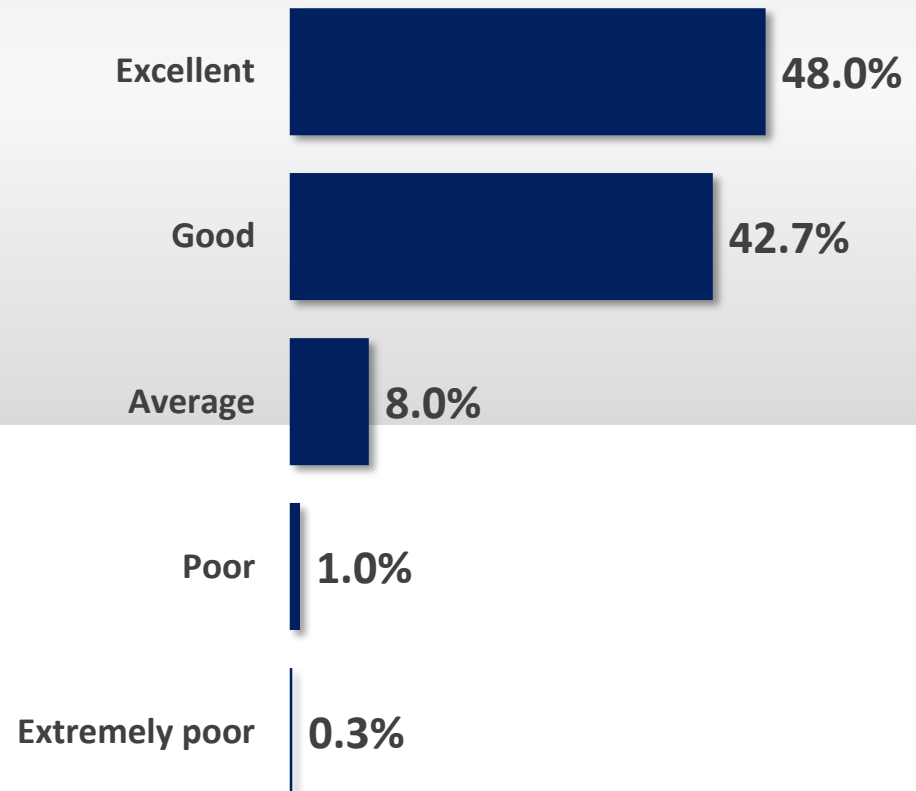


More than 96% of the youth sports visitors rated their experience as good/excellent. This is slightly better than the 91% of Branson family visitors overall.

Overall Branson Experience



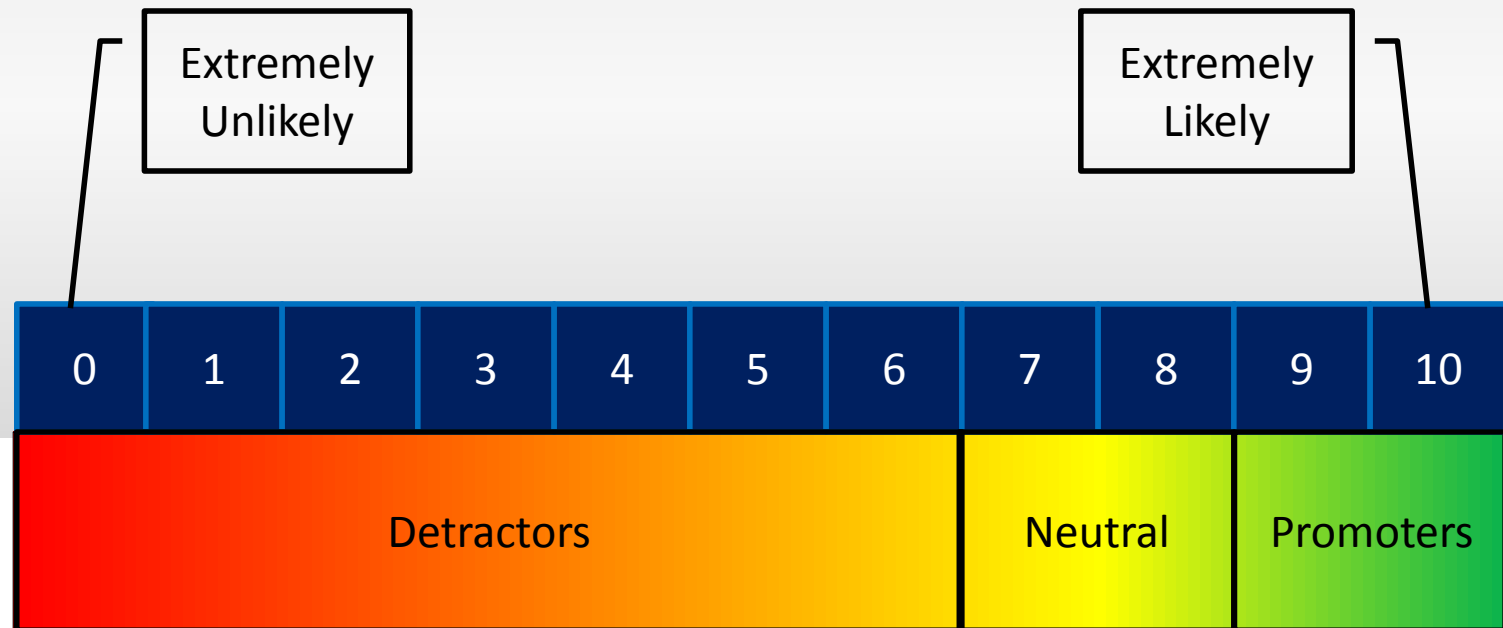
**Overall Experience
Branson Families Overall**



NET PROMOTER SCORE

Advocacy matters more than ever in today's digital market place. Net Promoter Scores measure the degree to which a brand has raving fans, brand haters and the indifferent.

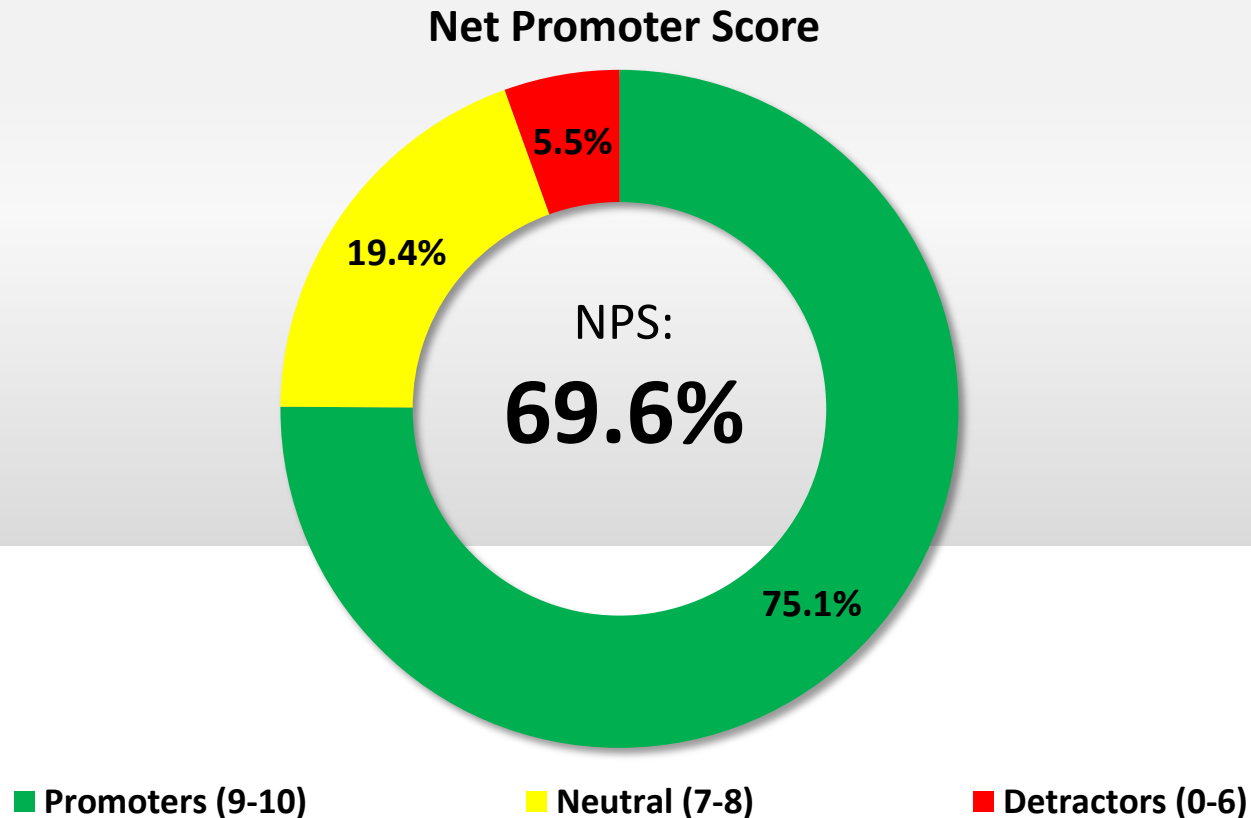
"How likely are you to recommend Branson, MO to a friend?"



Net Promoter Score = (% Who are Promoters) – (% Who are Detractors)

Developed by Satmetrix, Bain & Company, and Fred Reichheld in *The Ultimate Question*

This year's Branson youth sports travelers were raving fans of the destination. Youth sports visitors gave Branson a Net Promoter Score off 69.6%--significantly higher than Branson overall families (43.9%).*



**Branson's 2012 Advertising Effectiveness, visitors with children*

YOUTH SPORTS VISITOR PROFILE

Branson's youth sports visitors are younger, more likely to have kids and teens in their parties, live closer and have higher household incomes than the average Branson Family or Branson's Overall Visitor.

	Youth Sports	Branson Families	Branson Overall
% Live in Branson Area	15.4%	<i>n/a</i>	<i>n/a</i>
Average Party Age	45.7	32.3	50.4
Under 12 Years	20.3%	25.6%	9.7%
12-17 Years	23.5%	14.0%	6.1%
18-34 Years	6.4%	13.8%	8.9%
35-54 Years	41.5%	27.4%	20.9%
55+ Years	8.3%	19.2%	54.4%
Average Party Size	5.0	5.3	3.51
No. Visits per Year	3.3	2.7	2.6
Average Distance Traveled	126 miles	299 miles	399 miles
0-100 miles	46.9%	10.0%	7.8%
101-300 miles	34.4%	36.8%	28.5%
300+ miles	18.7%	53.2%	63.7%
Average HH Income	\$91.0k	\$86.2k	\$82.0k

APPENDIX

National Council of Youth Sports

The National Council of Youth Sports conducted a nation-wide study in 2008 of youth sports organizations. The Council found that many kids participate in more than one activity and in multiple seasons. In fact, 75% of kids participate in youth sports year-round. For indoor facilities, about 44% use a school and 36% use privately owned facilities. For outdoor sports, 52% use a community owned facility while 33% use a school. The study found that word-of-mouth is the #1 method of recruiting new participants. The organizations' websites are also a common method to increase participation. Other organizations use direct mail, event marketing, exhibit booths, flyers, banners, brochures, event advertising, print and web advertising, community newspapers, clinics and school recruitment to solicit new participants.





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Grow Your Business**

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2012 BCVB Youth Sports Study

Updated December 6, 2012

	2012
1 Live in Branson, Mo area	
Yes	15.4%
No	84.6%
2 Best describes this visit to Branson	
1st visit ever	7.5%
Visited earlier this year (2012)	37.7%
Visited last year (2011)	24.2%
Visited two yrs ago (2010)	6.7%
visited three yrs ago (2009)	2.8%
Visited four or more yrs ago (2008 or before)	21.0%
3 No. of visits to Branson in past 2 yrs for youth sports	3.3
1 visit	29.3%
2-3 visits	38.5%
4-5 visits	14.1%
6-10 visits	12.2%
10+ visits	5.9%
4 No. of years coming to Branson	15.3
1 year	5.0%
2-3 years	17.6%
4-5 years	9.5%
6-10 years	12.2%
10+ years	55.9%
5 Spend the night	3.4
Yes	77.3%
No	22.7%

2012 BCBV Youth Sports Study

Updated December 6, 2012

	2012
6 Branson area activities participated in	3.4
Shows	34.4%
Lake	21.2%
Golf	8.1%
Outdoor	35.5%
Shopping	66.3%
Excursion	15.0%
Silver Dollar City	40.3%
Fishing	10.3%
Museum	14.7%
ZipLine	10.6%
Winery	8.1%
Hiking/Biking	7.3%
Branson Landing	52.7%
Titanic	12.5%
7 Travel to Branson	
Camper/RV	3.8%
Church bus	0.4%
Motorcycle	0.0%
Personal auto	85.8%
Rented auto	9.2%
Motorcoach/Bus	0.4%
Flew	0.4%
8 Rate overall Branson experience	4.47
Extremely poor	0.7%
Poor	0.0%
Average	2.9%
Good	44.3%
Excellent	52.0%
SUM: Good/Excellent	96.3%
9 Why "Poor/Extremely poor"	
Click here for verbatim responses	
10 Branson Net Promoter Score	
% Rated 9 or 10	75.1%
% Rated 0 - 6	5.5%
Net Promoter Score	69.6%
Intent to Recommend Branson to a Friend - 0-10 pt scale	9.16

2012 BCVB Youth Sports Study

Updated December 6, 2012

	2012
11 Youth Sports Event	
Football	4.0%
Soccer	3.3%
Baseball	50.2%
Softball	26.0%
Basketball	7.0%
Volleyball	1.1%
Other	19.0%
12 No. of kids in youth sports group	25.3
0 - 25	82.5%
26 - 50	8.7%
51 - 100	4.6%
101 - 150	0.8%
151 - 200	0.8%
200+	2.7%
13 Travel to other cities for youth sports	
Yes	91.6%
No	8.4%
14 Compare Branson to other cities visited for youth sports	
Facilities available	4.04
Organization of event	4.00
Activities available outside event	4.32
Friendliness of area people	4.31
Value for the dollar	3.80
Top 2 Box	
Facilities available	76.2%
Organization of event	77.6%
Activities available outside event	85.5%
Friendliness of area people	87.0%
Value for the dollar	65.7%
15 Money spent in the area	\$767
Spending per person	\$153
Spending per person per day	\$44

2012 BCVB Youth Sports Study

Updated December 6, 2012

	2012
16 Party ages	45.7
Under 4	1.1%
4 - 7	5.2%
8 - 11	13.9%
12 - 14	18.6%
15 - 17	4.9%
18 - 24	1.6%
25 - 34	4.8%
35 - 44	22.4%
45 - 54	19.1%
55 - 64	4.6%
65 - 74	3.4%
75+	0.4%
Under 12 years	20.3%
12 - 17	23.5%
18 - 34	6.4%
35 - 54	41.5%
55+	8.3%
17 Party size	5.0
DEMOGRAPHICS	
18 Gender	
Male	38.3%
Female	61.7%
19 Distance	126
0 - 100	46.9%
101 - 300	34.4%
300+	18.7%
20 Respondent age	43.7
18 - 34	11.2%
35 - 54	76.0%
55+	12.8%

2012 BCVB Youth Sports Study

Updated December 6, 2012

	2012
21 Household income	\$ 91,034
Under \$25,000	1.7%
\$25,000 - \$49,999	13.4%
\$50,000 - \$74,999	26.3%
\$75,000 - \$99,999	21.6%
\$100,000 - \$124,999	14.7%
\$125,000 - \$149,999	11.2%
\$150,000 or more	11.2%
Sample Size	273
Margin of Error	5.9%

What type of youth sports group were you traveling to see?

Cheer
Cheer
Cheer
Cheer
Cheer
Cheer
Cheer competition
Cheer competition
Cheerleading
Cheerleading
Cheerleading
Cheerleading
Competitive cheer
Dance
Dance
dance
dance
dance
Dance
dance
dance
Dance
Dance
Dance
Dance
Dance
Dance
Dance
Dance
Dance
Dance
Dance
dance competition
dance competition
dance competition
dance competition
dance competition
dance events
Dancing
Extreme cheer
Girls fast pitch
Ironman
Ironman
Ironman
Softball

What type of youth sports group were you traveling to see?

track, swim

triathlon

Wakeboard

Wakeboarding

Wakeboarding

youth dance

youth dance

youth dance